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Brig. Gen. Edward G. Lansdale, USAF
Assistant to the Secretary of Defense
Department of Defense
Washington 25, D. C.

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In the absence of Mr. Dulles who is out of the city on a brief trip, I would like to acknowledge and thank you very much for your memorandum of 8 May and for the enclosed study that John Warner wrote on "Organization for Special Situations."

We appreciate your thoughtfulness in making this available to us and, when Mr. Dulles returns to his office, I will bring it to his attention.

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OFFICE OF THE SECRETARY OF DEFENSE
WASHINGTON 25, D. C.

61-3844

8 May 1961

MEMORANDUM FOR THE DIRECTOR, CENTRAL
INTELLIGENCE AGENCY

SUBJECT: John Warner's Study on "Organization for
Special Situations"

John Warner, Lt. Col., USAFR, recently completed his two-weeks active duty with my office. It was a pleasure to have him on the staff, and his conduct and performance impressed those with whom he dealt on the Secretary's staff most favorably.

I have inclosed as of possible interest to you the interesting paper on "Organization for Special Situations" which Lt. Col. Warner prepared during his tour of duty.

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EDWARD G. LANSDALE
Brigadier General, USAF
Assistant to the
Secretary of Defense

Inclosure

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EXCERPTED FROM AUTOMATIC
TRANSMITTER
5-10-61
THIS NOT APPROPRIATE

I. PROBLEM: To consider certain organizational aspects within DOD relating to the handling of special situations such as Cuba and Laos.

II. GENERAL:

A. We have seen that, while absolutely essential as it may be to prepare to fight a nuclear war or even a conventional limited war (with contending claims for the budget dollar), we may still lose the ultimate victory simply for failure successfully to wage "peace" in the Communist version. Perhaps there is no better way to express this problem than to use the words of President Kennedy of April 20, 1961.

"Too long we have fixed our eyes on traditional military needs, on armies prepared to cross borders or missiles poised for flight. Now it should be clear that this is no longer enough -- that our security may be lost piece by piece, country by country, without the firing of a single missile or the crossing of a single border.

"We intend to profit from this lesson. We intend to re-examine and reorient our forces of all kinds, our tactics and our institutions here in this community. We intend to intensify our efforts for a struggle in many ways more difficult than war."

B. Too many people are saying that if the United States with all its wealth, resources, and power cannot defeat, or prevent the establishment of, a Communist regime on our doorstep ninety miles away, then there is no hope for the future. But we must marshall our assets, realigning them as necessary to meet this threat which is not new but which is being put to use in a new background of erupting nationalism and the struggles of underdeveloped nations to fashion a stable destiny. The tools used are the typical Communist weapons welded into an overall program of propaganda, subversion, diplomatic action, threat of military force, guerrilla activities, political action, economic aid, and the rest. It must be recognized that the problem we face does not compartment itself into neat segments representative of the jurisdiction of those U. S. departments and agencies having responsibilities to counter the threat.

1. All will agree that there must be a fully integrated effort of all agencies of the U. S. Government, utilizing to the fullest the capabilities of each, developing new uses for some of these existing capabilities or creating new tools, if necessary.

2. In the blending of the efforts of the interested agencies, narrow jurisdictional lines of responsibility tend to be blurred. What is strictly military as opposed to the political aspects? How can one disassociate the propaganda impact of military moves or political actions? Allocations of jurisdiction based solely on the distinction between overt and covert will deserve particular attention. Proper applications of overt assets can be covert, or possibly more accurate "plausibly deniable" or "non-attributable".

C. Past efforts to arrive at an organizational solution on the national level attempted various approaches utilizing the NSC and its Planning Board. The 5412 Group was established to give policy approval to covert activities of CIA in support of the cold war, specifically in countering covertly Communist activities on a world-wide basis. The defunct OCB was another effort at effective inter-agency coordination. At the working levels in the various agencies there were extensive efforts at coordination and mutual support. None of this answered the question of "Who below the President himself is in command and who is responsible? This question becomes tremendously important in times of crisis with the accompanying acceleration of actions and decisions. The emphasis was on a mechanism for achieving full participation in arriving at a joint policy but left unanswered the problem of a mechanism for joint implementation.

D. Available within the Department of Defense there is no lack of knowledge of the nature of the enemy. Throughout the country, in the interested agencies of the Executive Branch and within the Department of Defense, there is what appears to be a groundswell of recognition of the seriousness of that part of the Communist threat which utilizes subversion, infiltration, propaganda, guerrilla warfare, and other means short of organized warfare. Accompanying this is the further apparent recognition that the U. S. must do more to counter this type of threat, utilizing similar weapons or other tools designed to cope with the specific tasks at hand. In fact, these techniques are well understood by some in the Department of Defense and have been for a long time. We see new studies such as the Ad Hoc Study Group Report entitled, "Counter-Guerrilla Warfare" approved in August 1960, and the more recent one by the Policy Planning Council of State entitled, "Counter-Guerrilla Operations." The essential points of these and many others were fully explored in WSEG 17 entitled, "Limited War" prepared in 1956 and WSEG 29, both of which dealt with guerrilla warfare and counter-insurgency operations. There have been many "live" examples of the Communist potential for waging "war" without employing military forces in the conventional sense. We have also had abundant experience in countering this type of threat. We have only to list the failures and successes in this regard to establish that we should know the problem and the ways of countering it - Malaya, Philippines, Indo-China, China Mainland, Laos and Viet Nam. While some in DOD have recognized the problem and have known it thoroughly, there

has been an inability within DOD to translate this knowledge into action in order to derive appropriate organizations with policies to meet this threat successfully. While organization will not of itself provide the answer to all problems, the existing structure, primarily organized a plan for and wage a war, if necessary, has not brought to bear the full weight of its potential in conducting the "peace".

III. DISCUSSION:

A. Our inability to throw back Communist indirect aggression calls for committing a greater portion of U. S. capabilities to the fray. Particularly in the action fields, such as guerrilla training and direct support of quasi-military activities, the DOD inevitably will be called on to do more simply because of its greater potential. In this and related fields, other agencies of the government are strained to the limits of their capabilities. Some redirection of effort, of course, is always possible, but in sheer size DOD remains the giant; e.g., in terms of people alone the ratio between DOD and CIA is in an order of magnitude of 200-1.

1. Greater use of DOD will call for continued recognition that such activities are truly special and their objectives different in concept than in a war. At times the methods and procedures will be unorthodox and not in military manuals. There will be a full intertwining of political and military considerations. In many situations there will be requirements for total security of a nature not generally appreciated. On the other hand these concepts are not unknown within DOD and no other agency has a monopoly on security, ingenuity, and clandestine know-how.

2. Pertinent to DOD in this respect is the current review of para-military activities of the U. S. Government. In that review it is almost a certainty that an examination will be made of whether CIA is or ever will be equipped to conduct an operation of a military character against an entrenched Communist regime equipped with a plentiful supply of armaments. It is a reasonable estimate that the future will disclose a larger role for DOD whether it be one of closer support of a specific CIA operation or a new role of having command responsibility for such an operation.

B. The recently approved Critical Areas Board and the Task Force concept is a new approach in attempting to marshall the assets of the agencies concerned. Selection of the Deputy Secretary of Defense as the Task Force Commander for Viet Nam answers many of the criteria which should be followed in any selection of a DOD representative to be a Task Force Commander. Such a person should be of sufficient rank and stature

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to enjoy the respect of participating agencies and to command the full cooperation of DOD components. Organizationally, such person should be easily accessible to the Secretary of Defense since the objectives of the Task Force will have political implications of sufficient importance to be of daily concern to the Secretary of Defense and the President. While depending fully upon the three military services, the JCS, and ISA, a DOD Task Force Commander should not organizationally be appended to any of these, but should be tied directly to the Secretary of Defense or his alter ego, the Deputy Secretary of Defense.

C. The designation of the Assistant to the Secretary of Defense for certain special activities as the Operations Officer for the Viet Nam Task Force is more than an acknowledgment of that individual's personal experience and intimate association with the area. Any representative of DOD designated to a Task Force should be closely associated with the function of that Assistant to the Secretary of Defense who was placed in the Secretary's office in recognition of the unique nature of the activities for which he is responsible. These require not only the closest security but also expeditious handling with a flexible approach. Another important factor is the special nature and sensitivity of certain of the activities which requires a focal point within DOD for its relationship with CIA and its covert operations and clandestine activities. The Assistant to the Secretary and his staff have acquired an intimate knowledge of special operations in DOD including the activities in support of CIA covert operations which would be essential to have available to a DOD representative on a Task Force. If future designations of DOD representatives to serve on Critical Area Task Forces, whether as member or Commander, are tied organizationally to the Deputy Secretary of Defense, he by direction then could be associated with the Assistant to the Secretary to use to the fullest the accumulated experience in substantive know-how in the special operations field and in obtaining secure expeditious staffing and coordination throughout DOD.

D. The concept of a Critical Area Board meeting at the call of any member to consider recommending to the President a determination that there is a Crisis Area imposes a new responsibility. What shall be the criteria for recognizing that an area is in a crisis situation or approaching it? Does a country have to be in a clear and present danger of slipping into Communist hands or will some lesser degree be the benchmark? Will it be enough that there appears to be an opportunity for a strong team effort to solidify what had been a weak but not yet dangerous situation? Presumably, criteria and indicators will have to be developed which will be utilized by those concerned. Within DOD where shall the responsibility rest for this? Where in DOD shall the responsibility rest for continuous monitoring of the world situation and making recommendations to the Secretary of Defense to call for a meeting of the Critical Area Board? Certainly, intelligence is a basic ingredient and one could consider assigning such responsibility to the proposed Joint Military

Intelligence Agency. On the other hand the Assistant to the Secretary of Defense is intimately aware of existing special operations and support of CIA covert operations. These probably will be involved in those situations which would be likely candidates for consideration as a Critical Area. This special knowledge affords an opportunity for appraisal of events and potential for action which is more to the point of a determination of criticality within the Critical Area Board concept than would an intelligence estimate. Through day-to-day relationships with CIA and State, the Assistant to the Secretary of Defense is in an excellent position to formulate recommendations, utilizing all components of DOD. This responsibility could be carried out with infringement upon or adjustment of existing responsibilities of other DOD components. It is but one step further to require the Assistant to the Secretary to develop, in coordination with other DOD elements, the indicators and criteria for considering an area critical for submission of such criteria to the Critical Area Board for their approval.

E. The Task Force concept, except for the fact that it has a Commander, might be compared to an expanded Special Group (5412) particularly if designation of membership is retained at the level of the Deputy Secretary of Defense, the Under Secretary of State, the Director of Central Intelligence, etc. Whereas the Special Group gives policy guidance and approval to covert actions of CIA, the Task Force will give direction to efforts of all agencies within the planned objectives submitted by the Task Force to the President for his approval. Under the Special Group, there was no joint mechanism to implement or execute policy approvals. There is considerable evidence that where the action or task required CIA to utilize something more than token DOD support, there became apparent a definite need for closer collaboration in the form of some type of joint CIA-DOD mechanism to assist in execution. This is particularly directed at the problem of what has been described as Covert Denied Limited War, i.e., the application by the U. S. of force or the direct support of force by foreign nationals in such fashion that it was non-attributable to the U. S. The current Task Force concept, where it will have such objectives or use such methods, does not provide for or recognize the need for such a mechanism.

1. Fighting a Covert Denied Limited War (which could be called sub-limited war) does not precisely fit the mold of either the professional soldier or the professional spy. There are some individuals in both DOD and CIA who could be considered knowledgeable. To prepare for this type of joint operation will require considerable preparation which should not be left until the crisis is here. Utilization for military purposes of CIA covert mechanisms including proprietary organizations requires some understanding of the techniques. Sheepdipped military personnel should have security guidelines

for their conduct and personal affairs. On the other hand, since it is a "war", albeit of different nature, CIA personnel should be afforded the opportunity of exercising in this field with professionals, both in the active sense of command and tactics, but also in the military logistics approach. A joint mechanism established now, preferably within CIA but under command of a mutually selected military officer, could prepare doctrine, conduct training, perform research, and provide a cadre for a crisis operation. The group should be small with appropriate representation from State and USIA, with principal staffing from DOD and CIA. Let this group work together learning each other's language, getting exposed to the administrative and coordination processes of their respective agencies. The participants would gain on behalf of their respective agencies a better perspective of the capabilities and limitations of the other departments. The sum of this group could well exceed the total of its various parts.

2. For the operation of a Task Force for a critical area the nature of the objectives should be examined with the methods of accomplishing them to determine the degree of close coordination required. If it appears to approach the nature of a joint operation, and probably most would, careful consideration should be given to a joint staff mechanism to assist the Task Force Commander in directing execution of the assigned tasks. Such a mechanism, for the period of crisis, could perform a valuable role in the relationship between the officer in charge in the field area and the Task Force Commander, particularly if these two were representatives of different agencies. The military services are experienced at joint operations and early learned the advantages of a joint staff as opposed to the weaknesses of coordination.

3. In view of the sheer size and complexity of the DOD structure, the DOD representative may find it desirable to establish an intra-DOD task force to assist him with his responsibilities. Probably there would be included representatives of the JCS, ISA, the military services, and the Assistant to the Secretary of Defense for certain specialized activities. It is to be assumed however that the DOD Task Force representative, even if he is the Commander, will utilize existing elements of DOD to the fullest for staff support thus avoiding the necessity of establishing any new DOD organizational unit which might tend to over-lap functions of present components. However, depending on the circumstances, a DOD Task Force Commander may well consider it desirable to establish some type of Command Post or 24-hour watch operation, particularly if armed violence and fast moving actions are involved.

F. Intensified efforts should be made within all appropriate components of DOD to review, study, and adjust the existing capabilities of all types to the end of focusing more strength on the threat of Communist indirect aggression. The military services, the JCS, ISA and possibly others should

be directed to study thoroughly this question making the results known to the Secretary of Defense. Adjustments of missions of specific components or units and increases in funds to support promising new avenues of exploration should receive special attention for recommendation to the Secretary of Defense. There may be new uses for existing assets or it may be necessary to modify or create new units within DOD. As an example, the concept that the mission of Special Forces was to provide support to the regular forces in the event of hot war has seriously hampered a broadened scope for full current utilization of the Special Forces in training of indigenous forces or in actual operations. While the Assistant to the Secretary of Defense for certain special activities has a current role in these matters, he should re-double his effort at stimulation, prodding, and assistance in these fields. The approved staff support element of the Assistant to the Secretary of Defense to be within JCS has promise in this regard by utilizing the staff strength within JCS for research and study, particularly on questions such as the policy aspects of DOD special operations.

G. The importance of the present responsibilities of the Assistant to the Secretary of Defense for certain special activities cannot be over-emphasized. World events and the Critical Area Task Force concept give added significance to the importance of the function. The inevitable increased role of the DOD in special operations points up the growth of this responsibility for the future. Add to this the current designation of the Assistant to the Secretary as Operations Officer for the Viet Nam Task Force and then consider the possibility of one or two more Critical Area Task Forces and one is forced to look at the question of saturation of the office and whether there is sufficient depth. With only a total of five professionals and having in mind certain contemplated changes, a conclusion is reached quickly. Granted the desirability of a small well-knit group, and particularly so where the subject matter is always "special", there should be more depth but certainly with quality maintained. Possibly, for a crisis situation, additional people could be detailed but nevertheless there should be a modest augmentation of the staff on a permanent basis so that full familiarity can be gained of the special nature of the problems and the different staffing techniques utilized. Three to five additional senior professionals would permit more flexibility for possible field trips and would provide required depth in event of illness of key individuals.

H. As now contemplated, a Critical Area Task Force will prepare a plan, including objectives and funding, for approval by the President. The source of funds is not clear and it is assumed this will vary with the case. In the past, and probably the future, the question of funds has been an obstacle in moving forward special operations. Policy approval

has often been obtained, for example, for CIA to go forward with substantial support from DOD, but often neglected is the question of who pays and from what source are funds available. Thus, while policy approvals have been granted the implementation has been hampered. A portion of this problem is undoubtedly a question of administrative procedures and lack of knowledge on the part of some individuals. In other cases, it is simply a question of there being no funds available. Since in many situations it is impossible to foresee the events which will require the expenditure, there will have been no opportunity to include funds for the situation in the normal budget process. True, there is always some slack, but eventually there are emergency actions for which there are no funds. A request for supplemental appropriation by the Congress is the normal answer, but there will remain some situations where neither time nor security permit this approach. It is also true that at times, Emergency Funds available to the President have been utilized. Consideration should be given to requesting the Congress to appropriate funds on a no-year basis to DOD as a Reserve for Emergencies to be expended in the field of Special Operations and counter-measures to Communist indirect aggression. These funds should, of course, be handled most carefully and be limited to new and unforeseen situations. Possibly, there should be a requirement that the Bureau of the Budget approve any transfers from the Reserve to give some assurance that the proposed purpose meets the criteria. The Reserve could be made available to the Secretary of Defense or it might be made available to the President with or without delegation to the Secretary of Defense. There is some precedent for a Reserve of this type and if the subject is carefully and candidly explained to the Congress, it is firmly believed they would approve.

IV. RECOMMENDATIONS:

A. Not only does it appear inevitable that DOD will play a larger role in countering indirect aggression, but it is strongly recommended that it should aggressively search for ways in which it can participate more fully. Within the government DOD has, in part by virtue of sheer size and adaptability of assets, the largest potential to bring greater weight to bear on the problem.

B. It is recommended that a DOD representative on a Critical Areas Task Force be appended organizationally to the Secretary of Defense or his Deputy. Additionally, he should be of appropriate rank, stature, and qualification to meet the problem at hand with ready access to, and enjoying the confidence of the Secretary of Defense.

C. DOD representatives on Critical Areas Task Forces should have the Assistant to the Secretary of Defense for certain special activities closely associated during the period of the Task Force and should utilize to the fullest the Assistant's substantive know-how in the Special Operations field and his administrative techniques for obtaining secure expeditious staffing and coordination within DOD.

D. Utilizing all available information, the Assistant to the Secretary of Defense for certain special activities should develop criteria which would warrant Presidential determination of a Crisis Area and should be responsible for continuous monitoring of the world situation in order to make recommendations to the Secretary as to when consideration should be given by the Critical Areas Board to a finding that a certain area was "critical".

E. There should be established now a joint mechanism, staffed by DOD and CIA with representation from ~~NSC~~ and USIA, to conduct training, perform research, and provide a cadre for a Crisis operation involving the application of military force, by the U. S., either directly or indirectly, but on a non-attributable basis.

F. Careful consideration should be given to establishing a joint staff mechanism to assist in execution of the tasks assigned to any Critical Areas Task Force.

G. Any DOD representative designated on a Critical Areas Task Force should utilize to the fullest existing DOD organizational units for assistance and staff support, but should consider the desirability of an intra-DOD task force to aid him in view of the scope and complexity of the DOD structure.

H. The Assistant to the Secretary of Defense for certain special activities should intensify his efforts in stimulating, prodding, monitoring, and assisting other elements of DOD in the field of special operations, and finding better or new ways to utilize existing capabilities to counter Communist indirect aggression.

I. Granting the desirability of a small, well-knit, highly qualified staff for special type activities, the staff of the Assistant to the Secretary of Defense for certain special activities should be modestly augmented by three to five professionals at a senior level to provide more flexibility to cope with increasing responsibilities.

J. The Congress should be requested on a careful and candid basis to make available to the Secretary of Defense funds on a no-year basis for a Reserve for Emergencies to be expended for unforeseen situations involving the Special Operations field or other counter-measures to Communist indirect aggression.

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15 May 1961

MEMORANDUM FOR THE DIRECTOR

SUBJECT: Brief of John Warner's Study on "Organization for Special Situations" (prepared while on 2 weeks' active duty in Ed Lansdale's office)

1. In John Warner's study on "Organization for Special Situations" he considers the problem of having certain organizational aspects within the Department of Defense participate more fully in the handling of special situations such as Cuba and Laos. In a discussion of this problem, he points out that throughout the country, in the interested agencies of the Executive Branch and within the Department of Defense, there is what appears to be a groundswell of recognition of the seriousness of that part of the Communist threat which utilizes subversion, infiltration, propaganda, guerrilla warfare, and other means short of organized warfare. He also gives some discussion to the recently approved Critical Areas Board and the Task Force concept.

2. John recommends that (A) DOD aggressively search for ways in which it can play a larger role as it has the largest potential to bring greater weight to bear on the problem; (B) Any DOD representative on a Critical Areas Task Force be appended organizationally to the Secretary of Defense or his Deputy; (C) DOD representatives on Critical Areas Task Forces should have the Assistant to the Secretary of Defense for certain special activities closely associated during the period of the Task Force and should utilize to the fullest the Assistant's substantive know-how in the Special Operations field and his administrative techniques for obtaining secure expeditious staffing and coordination within DOD; (D) The Assistant to the Secretary of Defense for certain special activities should develop criteria which would warrant Presidential determination of a Crisis Area and should be responsible for continuous monitoring of the world situation; (E) There should be established now a joint mechanism, staffed by DOD and CIA with representation from State and USIA, to conduct training, perform research, and provide a cadre for a Crisis operation; (F) Careful consideration should be given to establishing a joint staff mechanism to assist in execution of the tasks assigned to any Critical Areas Task Force; (G) Any DOD representative designated on a Critical Areas Task Force should utilize to the fullest existing DOD organizational units for assistance and staff support; (H) The Assistant to the Secretary of Defense for certain special activities should intensify his efforts in stimulating, prodding, monitoring, and assisting other elements of DOD in the field of special operations; (I) The staff of the Assistant to the Secretary of Defense for certain special activities should be modestly augmented by three to five professionals at a senior level to provide more flexibility to cope with increasing responsibilities; (J) The Congress should be requested on a careful and candid basis to make available to the Secretary of Defense funds on a no-year basis for a Reserve for Emergencies to be expended for unforeseen situations involving the Special Operations field or other counter-measures to Communist indirect aggression.

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~~MEMORANDUM FOR~~

During your absence, we acknowledged receipt and thanked Ed Lansdale for making John Warner's study available to us. Copies of Ed's memorandum and our reply have been sent to John Warner for his information.

Attached for your reading convenience is a brief of John's study.

AAB
15 May 61
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